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HRI Food Service Sector

Hotel, Restaurant, Institutional (HRI) Food Service Sector Report

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Report Highlights:

The best way for a U.S. company interested in exporting products to the Israeli HRI sector is to find an importer, an agent or a wholesaler who can advise the exporter on ways of complying with product regulations. Domestic and EU suppliers are the main competitors for U.S. exporters. Therefore U.S. exporters need to be competitive in their pricing. Fast food is the fastest growing industry in the HRI sector, with Middle Eastern food and hamburgers chains as the leaders in this industry.

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I. MARKET SUMMARY

The Israeli HRI market is very complex and diverse. The food service is divided into two: commercial and industrial. The commercial sector is divided into two subs – sectors: hotels and restaurants. The commercial sector comprises of estimated 650 hotels and hostels, around 2,300 restaurants, more than 700 celebration halls, over 420 coffee shops and cafeterias, and 115 pubs and bars. The institutional food service companies of around 4,000 institutions, such as company cafeterias, schools, universities, hospitals, prisons and kibbutz kitchens. The Israeli Defense Force (IDF) is probably the largest institutional food consumer in Israel and it is estimated that IDF alone consumes about 4 percent of all Israeli food consumption through its purchasing channels.

Annual expenditure on food and beverages in 2002 was NIS9,027 per capita, compared with NIS8,907 in previous year, a 1.3 percent increase. The HRI sector absorbs about 18.4 percent of the total food consumed in Israel.

The Central Bureau of Statistics (CBS) published a research titled “Dealers and Revenue of Economic Industry According to Value Added Tax 2000”. This report estimates the total revenue of Israeli food trade at NIS31.835 billion, of which the HRI sector’s share stands on NIS19.916 (62%).

The growth of the HRI sector is hard to determine because of the unstable political condition that affects the economic situation, specifically, tourism, restaurant going, etc.

Table 1: Type and number of food service establishment in Israel in 2001

Type of Establishment	Number of Establishments
Hotels	
Hotels	423
Youth hostels	125
Guest Houses	106
Restaurants	
Restaurants	2,321
Celebration Halls	703
Coffee Shops	426
Kiosks*	400
Pubs and Bars	115
Institutional Contracts	
Company Cafeterias*	1,580
Schools and Universities*	1,500
Kibbutz kitchens, elderly Homes	746
Hospitals and Prisons	221

*Estimated numbers

Source: CBS, Statistical Abstracts of Israel 2001, Yellow Pages, Food & Beverage Index, D&B, Ministry OF Tourism, Manufacturers Association.

Israel imports more food and beverages than it exports. In 2002, food imports totaled U.S.\$889 MILLION. The U.S. is an important supplier to Israel with a volume of \$245 million. The EU sales to Israel amount to U.S.\$457 million. Other main suppliers include Turkey,

Thailand and China. South American countries such as Brazil, Argentina and Uruguay export kosher meat to Israel.

The HRI sector has expanded significantly during the last 20 years. This growth was more rapid after 1990 as a consequence of an economic recovery and massive immigration from the Former Soviet Union (FSU), and the following domestic social changes:

- Increase in per capita GDP by 36 percent and personal wealth.
- Decrease in household sizes from 3.66 persons per household in 1980 to 3.30 persons in 2000.
- Increase in the number of women in workforce.
- Increase in leisure time.
- Increase in the distances from home to the workplace or school.

Another factor that boosted demand in the HRI sector was the growing number of tourists, both foreign and domestic. In 2000 during the Millennium celebrations, 2.4 million foreign visitors arrived in Israel, of which 69 percent were tourists, an increase of 3 percent over 1999. The following years saw a steep decline in foreign tourism, as a result of the ongoing political unrest in the region.

The average monthly household consumption of eating out in 2001 was NIS201.0 of which 65 percent was spent in restaurants, 19 percent in snack bars and kiosks and 12 percent in cafes and bakeries. The lowest quintiles spent an average of NIS79.5 per month (4 percent lower than two years earlier), while the highest quintiles spent NIS405.0 per month (6.9 percent higher than in 1999). These numbers are extremely low compared to other western countries, in which eating out comprises 35 to 45 percent of total food consumption, while the figures for Israel represent as 12 percent of the expenditure for food. An industry representative claims that 21 percent of the Israeli population eat fast food and 30 percent eat lunch at work.

Market access is frequently a challenge. As U.S. products have not only to comply with Israeli regulations but also have to cater to the Middle Eastern taste. Additionally they have to compete with similar products from Israel and EU countries, often at lower prices.

Table 2: Advantages and Challenges Facing U.S. Products in Israel's HRI Sector

Advantages	Challenges
Israel's HRI is in its beginning stages and the entrance fees to the market are still low	Limited experience and low awareness in developing a western style HRI sector
Fast food chains are boosting demand for U.S. products.	U.S. products at a price disadvantage compared to local market and European products
Ethnic food restaurants are popular.	U.S. products need to cater to the Middle Eastern taste.
The tourism industry demands more international foods.	Tourism is hurt by the political situation. Barriers against some imported foods, such as labeling requirements.
U.S. culture is very popular among Israelis	U.S. exporters are not aware of the potential Israel offers for some of their products.
U.S. products offer quality and variety for the local food service industry.	Lack of awareness of the variety and diversity of U.S. products.

A main characteristic of the Israeli food sector, to include all supermarket chains and almost any public food service, is the kashrut issue. Public food services will not serve food that is

not kosher, all institutional food suppliers and hotels are strictly kosher. Non – kosher items can be found only in privately owned restaurants.

Even though only 30 percent of Israelis are considered observant Jews, a 2001 survey prepared by the Manufacturers Association reveals that 63 percent of the Jewish population consumes only kosher food at home. However, many people who keep a kosher kitchen at home, eat non – food when eating out. It is assumed that that a slight change in these figures will occur in the future as a result of the increased purchasing power of the FSU immigrants, some of whom eat non – kosher food. However, this factor will have only a small impact on the HRI sector, mainly on the restaurant sub – sector.

The last few years have been difficult for Israel's economy, and the tourism industry in particular. The political unrest, acts of terrorism, and the global economic recession suppressed the tourism and hurt many other industries. A total of 14.6 million night stays at tourist hotels were recorded in 2002, a decrease of 3.3 percent compared with 2001 (15.1 million) and a 25 percent decrease from the 2000 record (19.6 million).

II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

The best way for a U.S. company interested in exporting products to the Israel HRI is to find an importer, an agent or a wholesaler well experienced with the HRI sector. This entity can facilitate custom clearance and advise the exporter on ways of complying with product specific regulations, such as labeling, packaging, import duties, and sanitary regulations. Most food distributors acquire their imported products through an importer or an agent, who are often also distributors with warehouses and transportation means, though there are occasions in which supermarket chains and large HRI chains import directly.

Tips from importers on ways of penetrating the Israeli market:

- Most importers seek a brand name that they can develop.
- All importers want exclusively on a brand name for a few years.
- Importers believe that promotion is essential for increased sales; therefore, they usually ask the exporter for a partial investment in a promotion campaign.

Guidelines for working in the Israeli market:

- You can sample the Israeli market taste by sending your product and price information to importers. Include labels and harmonized tariff numbers with the samples and ask importers for their opinion on the marketability of your product. Add a reply fax form to facilitate their response.
- Consider the range of trade shows and exhibit your product in most relevant show, such as SIAL in Paris in 2004, ANUGA in Cologne and IsraFood every November in Tel Aviv.
- Innovation can bring more results to a U.S. product. This innovation can be exhibited through the product itself, the packaging or pricing. Most popular products are new and have a higher than average trade margin and a professional support plan.
- U.S. exporters and suppliers need to focus their efforts on working with importers and distributors who serve the HRI sector, since food service companies rely on their suppliers for product selection.

B. MARKET STRUCTURE

The Israeli HRI is widely dispersed. Only large chains such as hotel chains or large or large caterers have a central purchasing office. Owners of small bars, cafeterias and restaurants, that account for the largest number of outlets, purchase fresh products in the local market or the wholesale market. Most beverages are bought through distributors, a well-organized sector. According to information gathered from fifteen HRI establishments, about 42 percent of the perishable products are obtained from distributors, 22 percent from wholesale markets and 18 percent from the retail sector. Commercial distributors to the HRI are quite dynamic, capable of supplying most of the needs of the country's small and diverse food service providers.

Many of Israel's food industries, that operate a distribution network, have developed departments specializing in supplying the HRI. Sales departments of leading companies such as Tnuva (dairy products, meat, fruit and vegetables), Osem – Nestle (pasta, dried soups, coffee, crackers, ice cream, chocolate), Tami – Best Food (margarine, mayonnaise, soups and powders, cereals, chocolate), Elite (chocolate, sweets, coffee, cereals), Meir Ezra (poultry, beef and fish) and many others, visit thousands of HRI establishments weekly or

daily in efforts to promote their products. In 2001 Tnuva, Osem and Tami-Best Food have each established a special division that produces and markets to the HRI market. These divisions are respectively, Tnuva-Chef, Nestle Food Service and Cater Plan.

The food import business is very dynamic sector in Israel, with over 300 food importers listed by the Tel Aviv-Jaffa Chamber of Commerce. The nationwide list is available from the Federation of Israeli Chambers of Commerce, 84 Hahashmonaim St. Tel Aviv 67011, P.O. Box 20027, Tel Aviv 67011, P.O. Box 20027, Tel Aviv 61200, Israel Tel.: 972-3-563-1010, Fax: 972-3-562-3274 e-mail: Chamber@tlv-chamber.org.il and on the web at <http://www.chamber.org.il>.

Importers and distributors are not as active in their marketing efforts. They wait for orders from their customers and rarely visit their clientele. Importers range from small two or three person sales operations that contract out distribution to larger companies who utilize their own fleet of trucks. All Israeli importers want exclusivity for newly introduced products because of the small size of the country.

Recently there has been a trend towards consolidation of larger importers; importers with an annual turnover of under \$25 million may find it hard to provide marketing and logistics needed for success. Likewise, many large Israeli food manufacturers are also large importers of raw material and consumer products.

C. SUB-SECTOR PROFILES

1. Hotels

Tourism is a very important industry to the Israeli economy. Israel is a popular tourist destination, offering a wide variety of tourist accommodations, for luxury hotels in major cities to bed and breakfast inns in smaller communities. The tourism infrastructure is well developed throughout the country and is continuously expanding. In 2000 there were total of 2,498 hotels, hostels, campgrounds, and bed and breakfast accommodations. 2000 was a peak year for the Israeli tourism industry due to the millennium celebrations and the pilgrims who visited Israel. Currently the tourism industry is in a crises situation due to the political unrest adversely affects the arrival of tourists, and the economic recession caused a decrease in the number of Israelis staying at hotels in Israel.

About eighty percent of the hotels are in the one to three star range, and the remaining twenty percent are in the four to five star category. Prior to the recent political unrest that hurt the tourism industry, hotel room capacity has grown at an annual rate of about four percent, while three and four star hotels have experienced the highest growth rates. About 38 percent of all hotels are less than ten years old.

Hotels: Income

	1999	2000	2002
Number of Hotels	339	340	336
Income – total (millions NIS)*	5,164.8	5,482.5	4,626.7
Income generated from rooms (millions NIS)*	2,932.9	3,078.5	NA**
Income generated from rooms (millions NIS)*	1,841.6	1,945.6	NA**

Source: CBS, Statistical Abstract of Israel, 2002

* In 2000 price terms

** Data not available yet

2. Restaurants

In 2001 there were 2,321 restaurants in Israel, with fast food being the fastest growing sub sector. Hamburger chains revenues amounted to NIS 650 million. Pizza chains NIS 400 million, Middle Eastern fast food (such as falafel) NIS 700 million, 20 million from Thai style noodles, and 20 million from sandwiches and ice cream. It is predicted that this market will grow by some 10 percent over the next five years.

Consumption of hamburgers has grown by 600 percent since 1993. In 2002 the sector's sales are estimated at NIS 735 million, two percent lower than in the previous year. The leaders of fast food in Israel for 2002 were McDonald's that took 45 percent of the market; following were the local Burger Ranch with 34 percent, and Burger King with 21 percent. Burger King has closed down recently and its customers are divided between the first two chains.

The leading Italian food chains are Pizza Hut, Domino's Pizza, Sbarro, and Pizza Domino, which take 62 percent of all of the sector's sales. There are also many small pizza outlets that compete in this market.

The Middle Eastern snack food is very popular in Israel, especially shawarma, falafel, and Hummus, both served as either a Pita sandwich or in plates in hundreds of small corner shops.

Until the onset of the present economic recession, conditions were favorable for the restaurant industry. Numerous gourmet and fashionable restaurants opened, many of them present ethnic cuisines, such as French, Italian, and Asian. An Average lunch costs NIS 50-80 (\$10-18) and dinner with wine costs NIS 90-150 per person.

The typical Israeli drinks soft drinks during lunchtime, or beer occasionally. Consumption of bottled mineral water is on the rise. Israelis refrain from alcoholic beverages while at work, and many of them do not consume alcohol at all. Beer and wine are consumed over dinners usually. Drinking wine at restaurants is increasing despite the relatively high price charged for wines at restaurants.

Table 3. Market Share of Different Fast Foods by Type, Israel 2001

Type	Share
Middle Eastern	35%
Hamburger	30%
Pizza	20%
Sandwiches	10%
Thai Food	5%

Table 4: Prominent Fast Food Chains in Israel 2001

Company Name	Outlet's Name, Type & No. of Outlets	Location	Purchasing Agent
Apropo	Apropo, coffee shops and dairy restaurants, 40	National	Direct, Importers
Kapulsky	Kapulsky, coffee shops and dairy restaurants, 25	National	Tnuva, Strauss, Others
Morag	Morag, Coffee shops and restaurants, 40	National	Various Suppliers
Rolladin	Rolladin, pastry shops and coffee shops, 7	National	Shemen
Dr. Lek	Dr. Lek, ice cream shops, 19	National	NA
Burger Ranch	Burger Ranch, hamburgers, 92	National	NA
McDonald's	McDonald's hamburgers, 80	National	Importers, Off-Tov, others
Snack Time (previously Subway)	Snack Time, sandwiches, 24	National	NA
Sbarro	Sbarro, Italian fast food, 20	National	Machlavot Gad – cheese, Tempo-drinks, Sheli-food products
Pizza Hut	Pizza Hut, Italian fast food, 43	National	Direct, Importers
Pizza Domino	Pizza Domino, Italian fast food, 60	National	Tnuva-cheese, Israeli flour mills - flour
Sabres	Sabres, Kibbutz restaurants, 13	National	Tnuva, various suppliers

Celebration hall are part of this sub sector. There are approximately 700 halls in which 30,000 weddings are celebrated annually, serving around 9 million meals. More than 76,000 Bar Mitzvahs and 90,000 Births (circumcision celebrations) take place, serving 10,8 million meals a year. Over the past few year celebration halls have suffered from the economic recession; the number of weddings have not changed, but the number of other family and business events has decreased significantly.

3. Institutional

There are between 450 to 500 companies in the institutional food service sub-sector, of which eight companies control 50 to 55 percent of the total market. This sector has a strong price competition and concentration, with small companies that are often highly specialized in one market niche.

Table 5: Leading Companies in the Institutional Sub-Sector

Company Name	Sales (\$Mil)	Type of Outlets	Location	Purchasing Agent
Shefa		Food for institutional kitchens	National	NA
Selected		Catering	National	NA
Norkeit			National	NA
Mevushelet		Prepared meals to companies	National	NA
Nir Ezion		Meals	National	NA
Moav	\$27 million	Meals to companies such as Intel, Tadiran	National	Tnuva-meata and cheese, Osem, Telma
L. Eshel			National	NA
Nadir		Meals to Kibbutz kitchens	National	NA

It is widely believed that more than one million meals a day are served in the institutional market; government entities purchase 25-30 percent of the total meals for the IDF, police, hospitals, and schools, and the rest is served at civilian work places. The average meal is estimated at a cost of NIS 12-15. Thus, this market's annual sales are estimated at US \$720-800 million.

Catering operators buy their raw materials in bulk. When making a selection on products and suppliers, most important factor is price. The second most important factor is the contribution of the product and supplier to the efficiency of the preparation process. Major changes in the past few years were in the supply of "portion controlled" products, development of dough products, especially frozen, development of ready to use and frozen vegetables, fruits, meats, and poultry. Leaders in this trade complain about lack of sophistication and too few changes. None of the leading caterers import directly.

Structure of the Institutional Food Market

Private industrial	64%
Hi-tech	20%
Government	10%
Private service	6%

Source: POC Consultancy 2001

III. COMPETITION

Domestic and EU suppliers are the main competition for US exporters. The US industry's main advantage lies in the normalization and standardization of regulations for products, reliability in supply, and product's quality. On the other hand, shipping costs, import duties and import licensing requirements are the main barriers to entering the market.

The two main food exporters to Israel are the EU and the U.S. In 2003 Israel imported \$ 2.130 billion worth of agricultural and food products, of which \$620 million from the US (CIF). Food exports from the EU amounted to 51% of total exports to Israel, and the US contributed to 29% of total food exports to Israel.

US exporters need to be competitive in their pricing or present products of excellent quality. Israel has a large food production industry of its own. There is also a strong price competition among food importers seeking to maintain or enlarge their market share. Nearby EU countries supply sophisticated foods and beverages to the Israeli market, and operate with relatively low transportation costs. On the other hand, US products benefit by tariff rate quotes and preferential customs tariffs. As result of Israel's trade agreements, new low priced supplies are entering the Israeli market from countries like Turkey, Hungary, Bulgaria, etc.

The US food industry has a very positive image in Israel from the aspect of reliability and food safety. At the same time, American foods do not always have a fine cuisine reputation. Likewise, some Israelis believe that Israeli made products are of higher quality and meet better the Israeli taste for food.

IV. BEST PRODUCTS PROSPECTS

Table 6: Products Present in the Market that Have Good Sales Potential

Product Category	2002 Market Size	2002 Imports	5-Yr. Avg. Annual Import Growth	Import Tariff Rate for US	Key Constraints Over Market Development	Market Attractiveness for USA
Frozen Beef	109,000 mt	55, 000 mt	Imports of frozen beef have not grown due to a shift in the market to consumption of fresh beef.	1217 tons TRQ. Imports above quota – 90% of MFN	Israel's K kosher Meat and Poultry Imports Law of 1994 requires that all meat and poultry and their products be accompanied by a kosher certificate from the Chief Rabbinate of Israel or a body authorized by it when imported to Israel.	The K kosher Import Law does not bind the Palestinian Authority, thus there is a fairly good market for US kosher beef among the 3 million Palestinians at the Palestinian Authority.
Fresh Chilled, and Frozen Poultry	340,000 mt	100 tons		290 tons TRQ. NIS 4.5 per 1Kg. above TRQ, BNM 172% of CIF price.	The K kosher Meat and Poultry Law above apply here too. A small TRQ of 290 tons would not justify the cost of specific kosher requirements to serve this market. To date no kosher supplier has been able to conform to Israel's requirements to obtain kosher approval from the Chief Rabbinate. Retail prices for fresh kosher chicken are close to US level: above \$2/lb.	Here too there may be a good market for Halal slaughtered frozen poultry or processed poultry products in the Palestinian Authority.
Fresh, Frozen and Prepared Fish	85,000 mt	\$91 million or 37.800 mt	4%	There is an annual duty free quota of frozen salt-water fish of more than 5000 mt. Frozen filets of salt-water fish are duty	Per capita fish consumption is relatively low compared with other countries. Although small amounts of shellfish and other non-kosher seafood are imported,	Israel imports the majority of fish and seafood it consumes. It is relatively easy to obtain kosher certification for fresh or frozen fish that have

				free. US gefilte fish is imported duty free under a 160 ton TRQ	the market is limited and the Rabbinate does not grant kosher certifications. One constraint is the lack of consumer recognition of the US as a source of quality fish, other than tuna.	kins and scales (the latter mean they are kosher).
Dried Fruits	6,200 tons	6,200 tons	The market is expected to grow as demand for imports continues to put pressure on the TRQ and on the Israeli authorities.	TRQs of 1050 mt for raisins and 1200 mt for prunes. Some ex-quota imports take place, especially of prunes.	Past trade is not the sole criterion to determine the size of quotas. It is difficult for exporters to establish on-going relationships with importers to work on market development.	Kosher certification for dried fruits and nuts is easily obtained. Consumers demonstrate preference for US Jumbo Golden Seedless raisins.
Nuts	16,100 mt	\$12 million or 10,200 mt		There is no duty on nuts of US origin, with the exception of almonds. The EU gets a 15% duty.	There is a significant price gap between US and Iranian products, and a definite consumer preference for the Iranian products.	With appropriate market development activities, US market share could grow significantly.
Bakery Goods	\$ 1 billion	\$81 million		Most U.S. items have a 10.8% tariff rate.	Bakery items perceived as foreign, such as croissants, English muffins, American style bagels, have not fared as well in Israeli supermarkets.	Foreign baked goods are accepted in Israeli cafes. Frozen pizza is a staple in most Israeli households with young children.
Breakfast Cereals	\$29.0 million	\$17.1 million		Duty free	Price competition with European suppliers makes this market very sensitive to exchange rates. The large volume to value ratio makes the long haul from the US relatively costly and reduces the competitiveness of the American product.	

Noodle Products	\$90 million	\$16.3		7.2% BNM NIS 0.34 per 1 kg.	Imported products from Italy dominate the imports market. The Italian products were introduced before the American, therefore the consumer is familiar with them, and the Italian products have a price advantage. Kosher certification may be more difficult to obtain than other baked goods, but there are brands of noodles in the US that already have kosher certification.	There is almost no imported presence in the frozen ready to eat pasta which Israeli producers dominate.
Soups and Sauces	2,400 tons or \$19 million	\$5 million		Most sauces from the US are duty free	Soups and sauces that contain meat/poultry products require a kosher certification from the Chief Rabbinate.	
Snacks	\$100 million			Microwave popcorn is duty free Chips are at 10.2%	Snacks, particularly savory snacks, are among the most highly competitive sectors in the food market. Israelis do not like cheese coating on their peanut snacks.	In the last few years there has been an increase of 10-15% in microwave popcorn sales. The ultra-orthodox families, which are characterized by large families and low income are a major source of demand since popcorn is low cost and nutritious and fits the limited budget of these large families.

Beverages	\$600 million	\$74.7 million	The duty free quota and the change in customs tariff for wines above the quota will improve the relative situation of the wines from U.S.	Starting January 2004 there is a 200,000 L duty free quota for wine. Natural fruit juices at large packages are at 10.8%, for retail packages add NIS 1.47 per 1L BNM 45%. Spirits are duty free.	Consumption of alcoholic beverages is low; the per capita base is 4-6 liters per year. Wine and beer are not an integral part of Israelis daily meals. Kosher requirements for wine are particularly rigorous.	Lately, imported high energy drinks seem to be catching on. Mineral water and natural fruit juices are popular in Israel. Immigration from the former USSR increases the demand for alcoholic beverages. There is room in the market for quality kosher wine of US origin. The Muslim population in the Palestinian Authority and Israel constitute an interesting market for non-alcoholic beer.
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Israel	Web Site	www.fas.usda.gov

Web addresses for further information:

The Central Bureau of Statistics	http://www.cbs.gov.il
Ministry of Industry and Trade	http://www.tamas.gov.il/tamas_en.htm
Ministry of Finance – Customs Authority	http://www.mof.gov.il/customs/eng
Israel Export Institute	http://www.export.org.il
Ministry of Health	http://www.health.gov.il/english.htm
Ministry of Agriculture	http://www.moag.gov.il/english/
Veterinary Services and Animal Health	http://agri3.huji.ac.il/~yakobson.vetserv/
Israel Chambers of Commerce	http://www.chamber.org.il/english/
Israel America Chamber of Commerce	http://www.amcham.co.il

Additional Market Sector and High-Value Products Reports:

Israel, The World's Largest Kosher Market, 10/2001, also look for an updated report on 10/2003.

www.fas.usda.gov/gainfiles/200110/130682378.pdf

Production and Marketing of Honey in Israel, 9/02

www.fas.usda.gov/gainfiles/200209/145783734.pdf

Israeli Requirements for Recognition of Kosher Slaughter in the US, 7/2001

www.fas.usda.gov/gainfiles/200107/120681187.pdf

Country Report on FSIS Import Regulations, 9/2003

Retail Industry Report, 11/2003